

Manage Institution Profile

1 Introduction

PAMS gives users the opportunity submit and manage proposals and awards processed by the Department of Energy (DOE) Office of Science (SC) in a centralized location. There may come a point during the grants process that the Admin Sponsored Research Officer (SRO) of an institution must make changes to – or manage – their institution's information.

The purpose of this document is to provide step-by-step instructions for users to follow to manage their institution.

2 Prerequisites

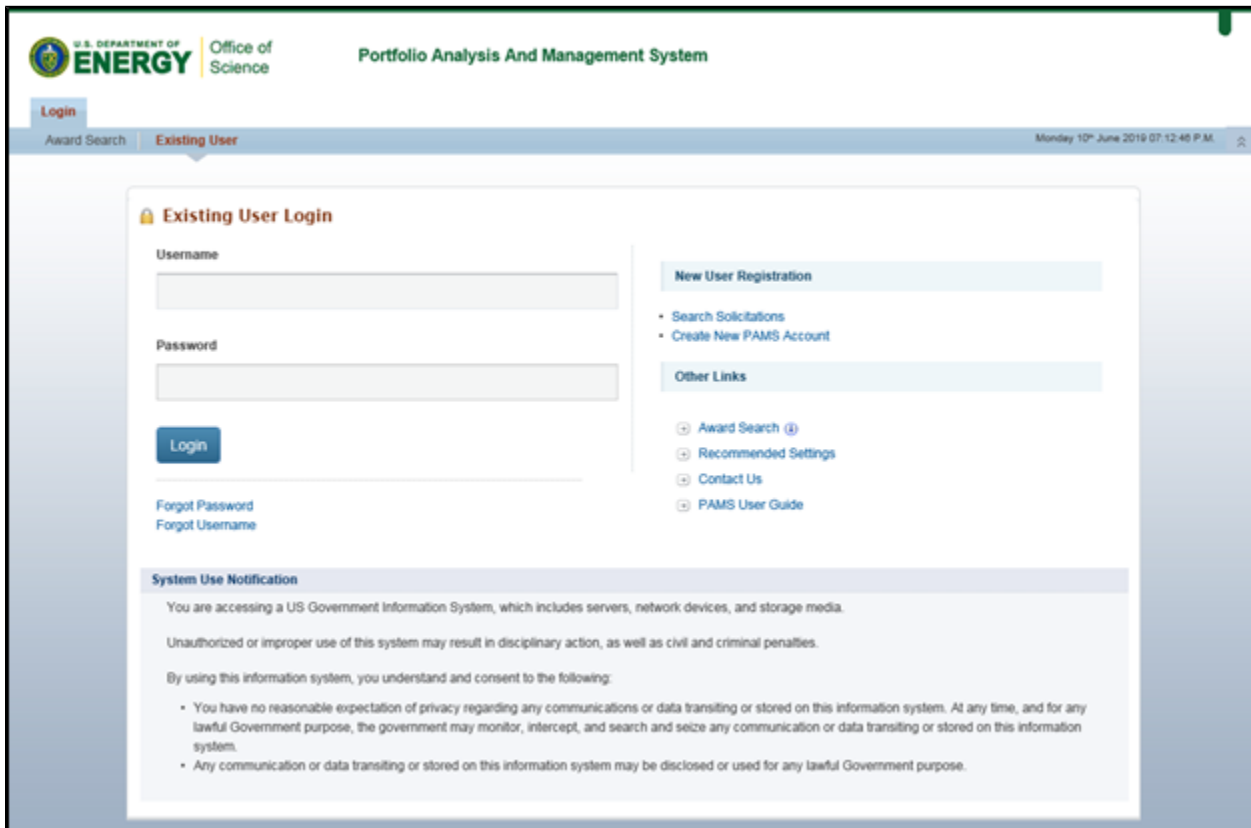
Before a user can manage an institution, the following criteria must be met:

- The user has an active, external PAMS account.
- The user is registered to an institution.
- The user possesses the Admin SRO privilege for the institution.

3 Managing an Institution

Use the following steps to manage an institution.

1. Log in to your external PAMS account at (Figur1): <https://pamspublic.science.energy.gov/webpamsepsexternal/login.aspx>



U.S. DEPARTMENT OF ENERGY Office of Science Portfolio Analysis And Management System

Login Award Search Existing User Monday 10th June 2019 07:12:48 P.M.

Existing User Login

Username

Password

Login

[Forgot Password](#)
[Forgot Username](#)

New User Registration

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System Use Notification

You are accessing a US Government Information System, which includes servers, network devices, and storage media.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

- You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.
- Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

Figure 1. PAMS External Login

2. Navigate to the Institutions tab (Figure 2).

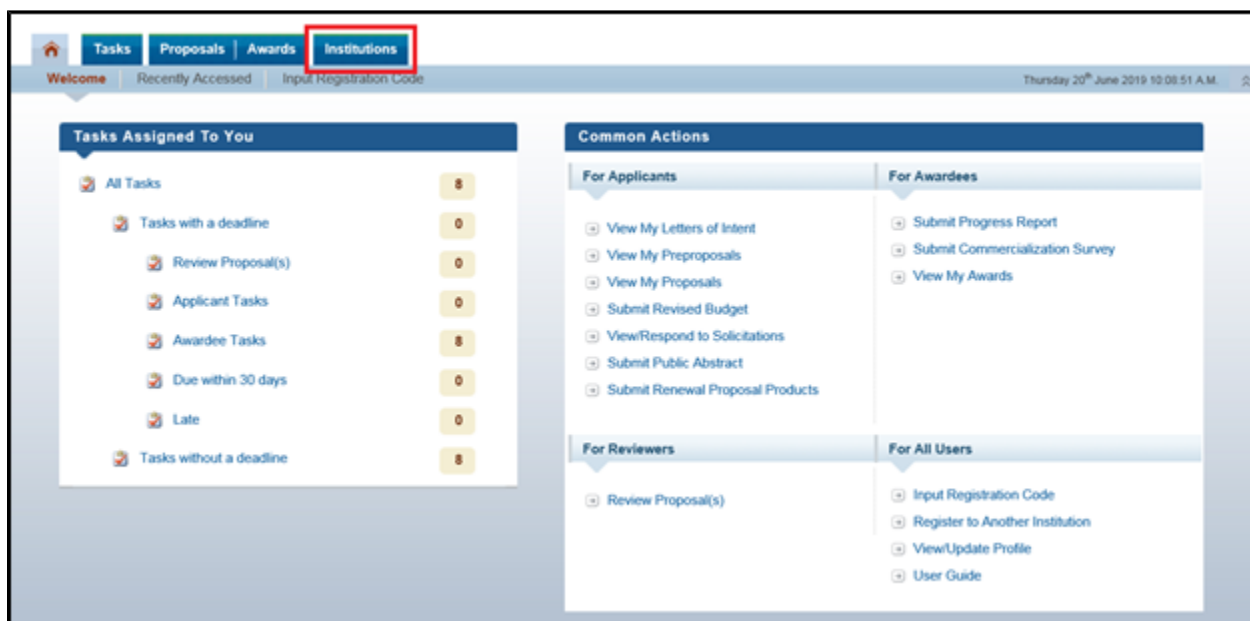


Figure 2. PAMS Homepage, Institutions

3. PAMS will load the "Institution – List" page, which displays a list of all of the institutions you are registered to in PAMS. There are three Manage Institution options: **Manage Users**, **Update Profile**, and **Update Communication Contact**. To perform one of these Manage Institution actions, click the **Actions/Views** menu, and make a selection (Figure 3).

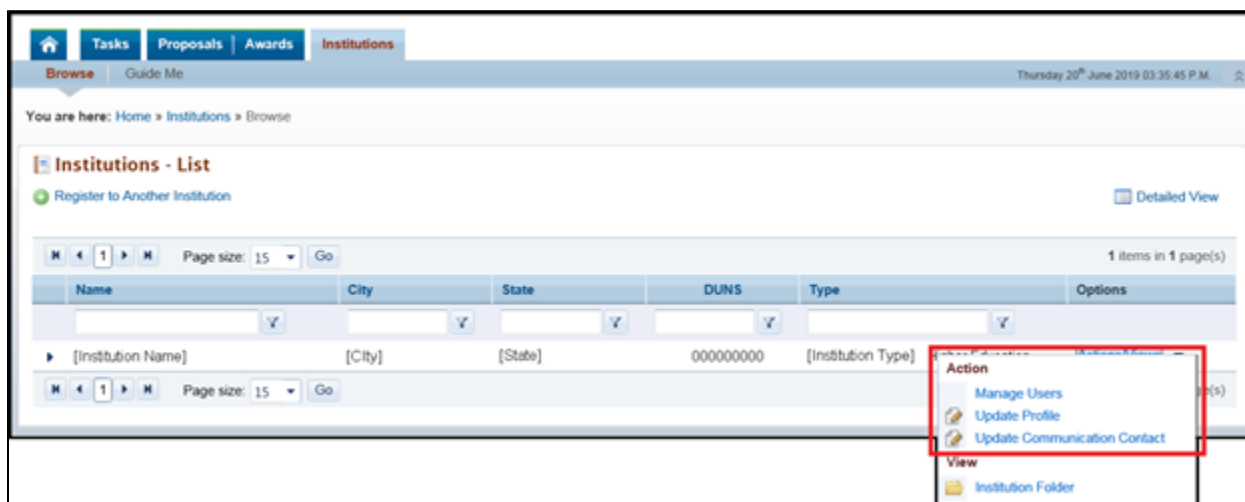


Figure 3. Institutions – List

3.1 Managing Users

Upon selecting **Manage Users** in the **Actions/Views** menu on the "Institutions – List" page, PAMS will navigate you to the "Manage Users" page. For guidance on managing users and peer access, see *How To Guide: External – Manage Peer Access (Preproposal, Letter of Intent (LOI), Proposal, Award)*.

3.2 Updating the Institution's Profile

Upon selecting **Update Profile** in the **Actions/Views** menu on the "Institutions – List" page, PAMS will navigate you to the "Update Institution Profile" page. This profile contains important information about the institution, including the institution's name, type, and address. You must complete all of the required fields before saving the page.

Refer to the table below to complete the required fields.

Required Fields

Element	Description
---------	-------------

Institution Name	Enter the name of the Institution.
<i>Institution Type</i>	Click the Select One dropdown, and select an Institution Type.
<i>Mailing Address (Required)</i>	<p>Enter a mailing address. To do so, select one of the following:</p> <ul style="list-style-type: none"> · Address · PO Box Only · Rural Route <p>To enter an <i>Address</i>:</p> <ul style="list-style-type: none"> · In the "Street Number" field, enter the number of the location only. For example, if you live at 123 41st Street, enter 123 in the "Street Number" field; omit 41st. · In the Select one dropdown, select an option to specify the location type of the number in the "Street Number" field. · In the "Number" field, enter the number of the location. For example, APT 3, BLDG 5A, etc. <p>To enter a <i>PO Box Only</i>:</p> <ul style="list-style-type: none"> · In the "Number" field, enter only the number of the PO Box. <p>To enter a <i>Rural Route</i>:</p> <ul style="list-style-type: none"> · In the Select One dropdown, select an option to specify the type of rural route. · In the "Number" field, enter the number of the Rural Route. · In the "Box" field, enter the mailbox number.
<i>City</i>	<p>Enter the city in which the address is located.</p> <p>NOTE: This field is only required if the "Zip Code" field is left blank.</p>
<i>State</i>	<p>Use the "State" dropdown to select the state in which the address is located.</p> <p>NOTE: This field is only required if the "City" field is completed.</p>
Zip Code	<p>Enter the zip code in which the address is located. If necessary, use the Lookup link to help determine the appropriate zip code of the address.</p> <p>NOTE: This field is only required if the "City" field is not completed.</p>

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Update Institution Profile

[Institution Name, City, State]

DUNS: 000000000

EIN: 00000000

Institution Type: [Institution Type]

Primary SRO/BO/IO (Sponsored Research Officer/Business Officer/Administrative Officer): LastName, FirstName, LastName, FirstName, LastName, FirstName

Fields with * are required.

Institution Information

* Institution Name

Institution Website

* Institution Type

If Other, please specify:

Sub Type

☐ Women Owned
 ☐ Socially And Economically Disadvantaged

EIN/TIN

Sole proprietors and individuals may use their Social Security Number (SSN) as assigned by the Social Security Administration (SSA) as their Employer Identification Number (EIN) if the Internal Revenue Service (IRS) has not assigned an EIN. An SSN used as an EIN will not be treated as Privacy Act data. To obtain an EIN, contact the IRS at <http://www.irs.gov>.

DUNS

(Example: 123456789 or 123456789INDV)

* Mailing address (Required)

Mailstop Code (Internal Routing)

Division / Department Name

Address Type

☐ Domestic Address
 ☐ International Address

Refresh

Specify Domestic Address (Street Address or PO Box Only or Rural Route)

☐ * Address

Street Number

Select One

Number

* Street Name

☐ * PO Box Only

Number

☐ * Rural Route

Type

Select Route

Number

Box

* City

Cambridge

(Required if Zip is not specified)

Urbanization

(Used only for Puerto Rico(PI))

* State

(Required if City is specified)

* Zip Code (Lookup)

(Required if City is not specified)

Congressional District

(Example: 01)

Providing the address information below is optional. If you decide to provide the address then all fields marked with an * are required.

Click here to enter physical location address if different from mailing address. (Providing this address is optional.)

Address Type

☐ Domestic Address
 ☐ International Address

Refresh

Specify Domestic Address

* Address

Street Number

Select One

Number

* Street Name

* City

(Required if Zip is not specified)

Urbanization

(Used only for Puerto Rico(PI))

* State

(Required if City is specified)

* Zip Code (Lookup)

(Required if City is not specified)

Congressional District

(Example: 01)

Cancel

Save and Continue

Figure 4. Update Institution Profile



If the institution possesses a physical location address that is different from the mailing address, you may enter the address in the "Click here to enter physical location address if different from mailing address. (Providing this address is optional.)" section. Refer to the table above to complete the required fields in this section.

1. Once you have completed the required fields, click **Save and Continue** in the bottom right corner of the page (Figure 4).
2. MS will return you to the “Institutions – List” page, and display a Success message confirming that the Institution Profile was updated successfully (Figure 5).

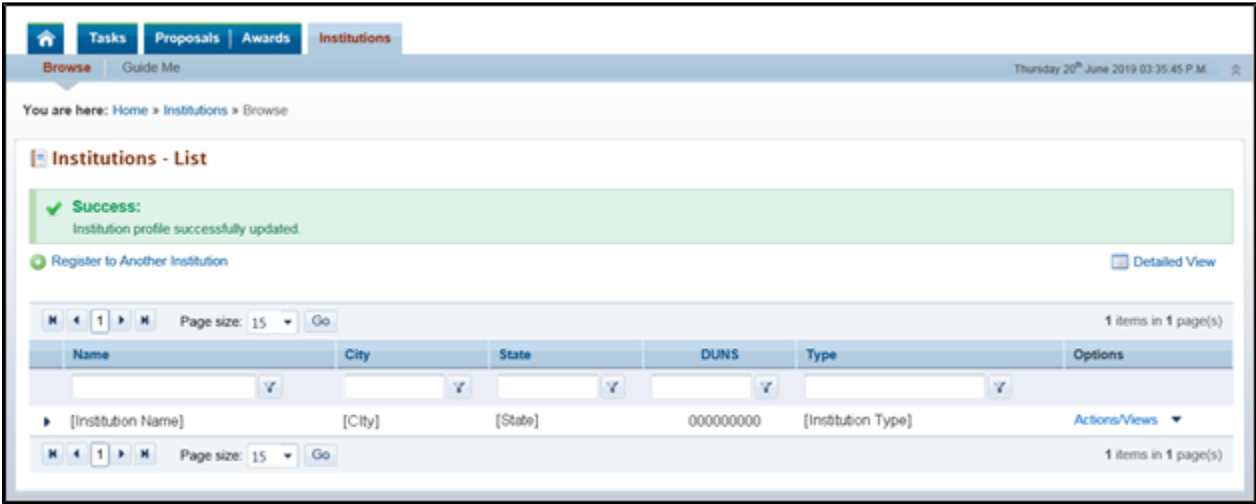


Figure 5. Institutions – List, Success

3.3 Updating Communications Contact

Upon selecting **Update Communication Contact** in the **Actions/Views** menu on the “Institutions – List” page, PAMS will navigate you to the “Update Communication Contact” page, which displays the contact information for the institution’s Communication Contact. Use the following steps to change the Communication Contact for the institution.

1. Select **Change** in the **Actions** menu for the current Communication Contact (Figure 6).

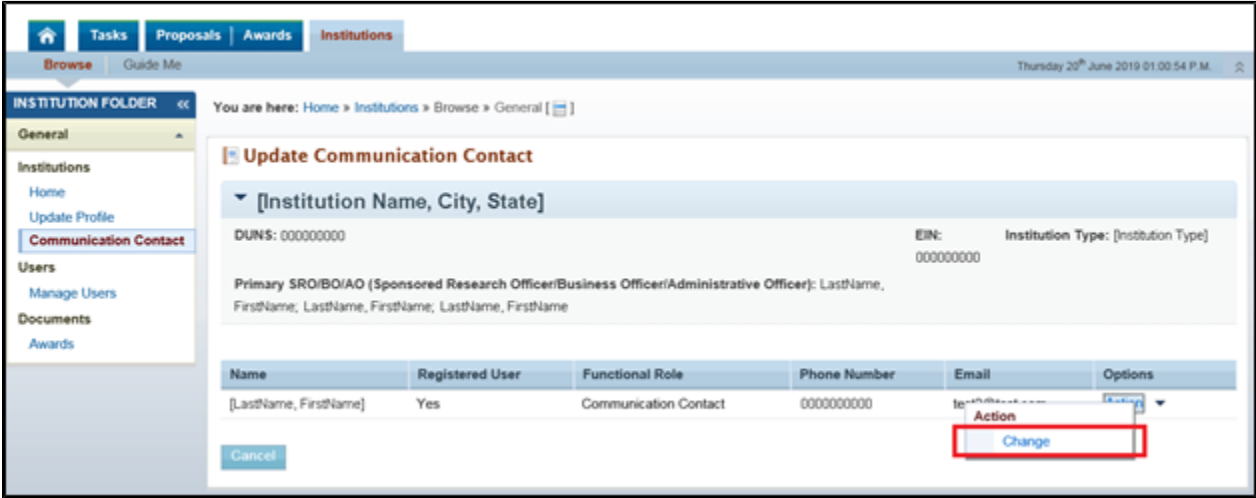


Figure 6. Update Communication Contact, Change

2. PAMS will navigate you to the “Update Communication Contact – List” page, which displays a list of users registered to the institution. Browse the list or use the filters or Search above the grid to locate the person you would like to make the new Communication Contact. Once you have selected a person, click **Select User for Role** in the **Action** menu in the Options column (Figure 7).

Update Communication Contact - List

[Institution Name, City, State]

DUNS: 000000000 EIN: 000000000 Institution Type: [Institution Type]

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): LastName, FirstName, LastName, FirstName

1090 items in 73 page(s)

Name	Is Registered	Email	Phone	Role	Options
[LastName, FirstName]	Yes	[Email Address]	000-000-0000	PI	Action
[LastName, FirstName]	No	[Email Address]	000-000-0000		Select User for Role
[LastName, FirstName]	No	[Email Address]	000-000-0000	PI	Action
[LastName, FirstName]	No	[Email Address]	000-000-0000	Other	Action

Figure 7. Update Communication Contact – List, Select User for Role

3. PAMS will reload the “Update Communication Contact – List” page with the contact information of the person you selected in the grid. Click **Confirm** in the bottom right corner of the page to select the person as the new Communication Contact for the institution (Figure 8).

Update Communication Contact

[Institution Name, City, State]

DUNS: 000000000 EIN: 000000000 Institution Type: [Institution Type]

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): LastName, FirstName, LastName, FirstName

Confirm Action to be Taken

User: [LastName, FirstName]

Username: [Username]

E-mail: [Email Address]

Phone Number: 000-000-0000

Cancel Confirm

Figure 8. Update Communication Contact – List, Confirm

4. PAMS will return you to the “Update Communication Contact” page, and display a Success message confirming that you have updated the institution’s Communication Contact successfully. PAMS will also display the new Communication Contact with accompanying contact information in the grid (Figure 9).

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Update Communication Contact

Success:

Successfully updated Communication Contact.

[Institution Name, City, State]

DUNS: 000000000

EIN: 000000000

Institution Type: [Institution Type]

Primary SRO/BO/IO (Sponsored Research Officer/Business Officer/Administrative Officer): LastName, FirstName, LastName, FirstName

Name	Registered User	Functional Role	Phone Number	Email	Options
[LastName, FirstName]	Yes	Communication Contact	0000000000	[Email Address]	Action

Cancel

Figure 9. Update Communication Contact, Success